



**GOVERNOR'S OFFICE OF
PLANNING AND BUDGET**

BUDGET TOOL

USER MANUAL

Section III – Performance Measures

**270 Washington Street, SW, 8th Floor
Atlanta, Georgia, 30334
404-656-3820**

opb.georgia.gov

GOVERNOR’S OFFICE OF PLANNING AND BUDGET
BUDGETTOOL USER MANUAL
SECTION III – PERFORMANCE MEASURES

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Program Measures and Prioritized Program Budgeting

Performance information helps agency officials and program managers monitor the effectiveness and efficiency of agency strategies and programs; provides crucial information for state decision-makers; and establishes the context for the state's annual budget. Program measures are particularly important when revenue shortfalls result in program funding reductions. Measures can tell the story of successful process improvements, impact of budget reductions or doing more with less.

Agencies will enter their program measures in the BudgetTool system using the step-by-step instructions in this user guide. Agency users and administrators should coordinate to access the BudgetTool system and enter the measures and data. In most agencies, the BudgetTool administrator is in the budget office.

The BudgetTool Program Measures module is currently available for data entry for approved users. Agencies must update their program measures in BudgetTool as part of their agency budget requests.

The process for the program performance measure consists of three primary steps:

1. Agencies review and update their program performance measures in BudgetTool
2. OPB reviews program measures and publishes select measures in the Governor's Budget Report
3. OPB publishes the Agency Performance Measures report on OPB's website

OPB requests that agencies identify three measures per budgeted program, including a workload measure, an efficiency measure and an effectiveness measure. Additionally, agencies are to provide four years of historical performance results for each measure, where possible. OPB will publish select performance measures in the Governor's Budget Report and post a comprehensive list of agency measures on OPB's website.

It is important to note that the measures in the Governor's Budget Report are published directly from the BudgetTool system. Consequently, agencies are responsible for ensuring that measures are entered correctly and the data is accurate.

Agency performance data are subject to periodic audits for completeness and quality. Accordingly, agencies need to keep all details of surveys and other data collection techniques for at least five years. Agency records must be detailed enough to satisfy a thorough review of the data collection methodology. This year, agencies will validate their measures within Budget Tool to attest to the accuracy of performance information.

This user guide provides information on accessing the BudgetTool performance measures entry screens, and step-by-step instructions on entering and updating the measure data. If you have problems with the system, please submit a ticket from the BudgetTool welcome page following the procedure in the appendix of this manual. If you have other issues that cannot be resolved through the ticket system, please call Tracie Wheaton at (404) 463-5544 for technical assistance. For assistance with developing measures, please contact Alice Zimmerman at (404) 657-7316 or via email at alice.zimmerman@opb.state.ga.us.

Process Overview

ATTENTION

The agency prior year cutoff amendment must be loaded before performance measure data can be entered into BudgetTool.

- Step 1:** Agency administrator sets up agency performance measure users.
- Step 2:** Go to OPB's web site: <http://www.opb.georgia.gov/> and click on the **Links** Tab. In the dropdown menu, click **OPB Applications**. Click the **BudgetTool** icon.
- Step 3:** Agency user logs onto system from the BudgetTool welcome screen by clicking the **Start BudgetTool** button.
- Step 4:** The MS.NET software will automatically load onto the user's PC. For additional background and instructions for installing MS.NET, please read Sections I and II of the BudgetTool User Manual located on the BudgetTool main page: <http://budgettool.opb.state.ga.us/>.
- Step 5:** Update the program measures and performance data in the BudgetTool system. Detailed instructions for entering measures into BudgetTool follow.

Entering Measures into BudgetTool

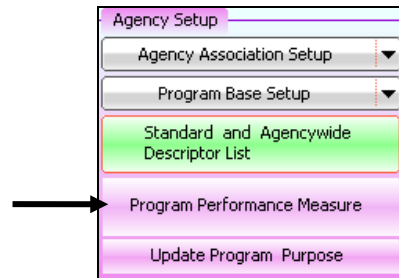
A. Accessing the Program Performance Measures in BudgetTool

1. Click the **Agency Setup** Shield



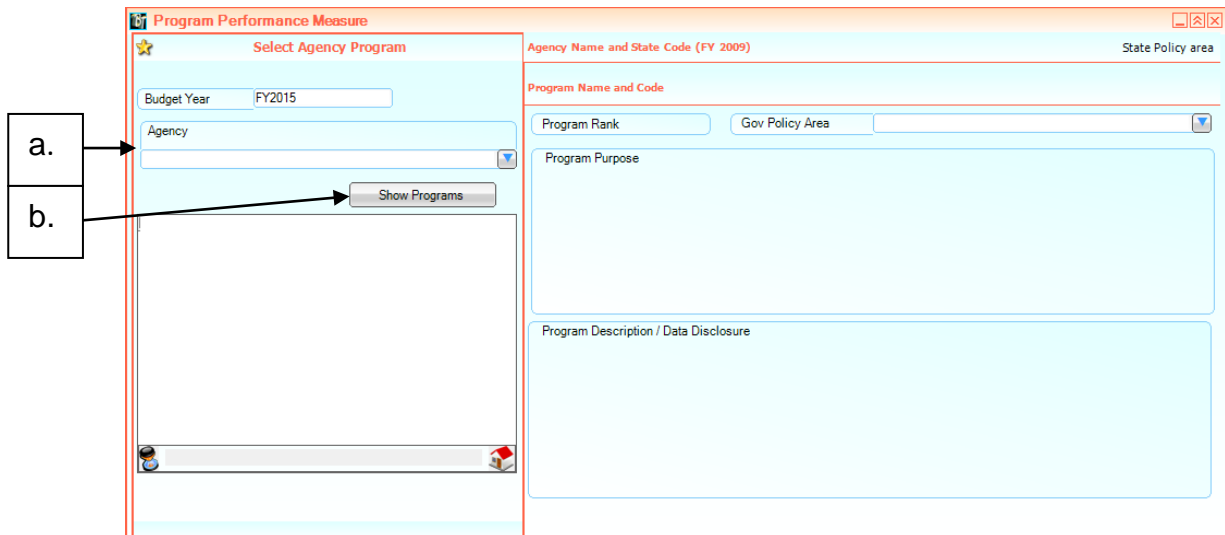
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2. Click Program Performance Measure



3. Update Program Performance Measure Screen

- a) Select the Agency from the menu list
- b) Click the **Show Programs** button



- c) (1) Double-click the program name or (2) highlight the program name and click the **Edit Program Information** button to view the Program Rank, Gov. Policy Area, Purpose and Description.

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c(1) or (2)

Code	Name
0740201	Athens and Tifton Veterinary Laboratories
0740300	Consumer Protection
0740101	Departmental Administration
0740400	Marketing and Promotion
0740501	Payments to Georgia Agricultural Exposition Authority
0740501	Poultry Veterinary Diagnostic Labs

- d) Program Rank: Changes to program ranking requires approval of the agency head, and notification by email of the OPB analyst
- e) Gov. Policy Area: The Governor's Policy Area should be prepopulated based on the primary policy area for which your agency is funded. Changes to this field may only be edited by the OPB.
- f) Program Purpose: The purpose statement can only be edited by OPB. The purpose statement should be the same as the program purpose statement in the most recent Appropriations Act. Agency users cannot change this section. The maximum character length is 4000.
- g) Program Description and Data Disclosure: Changes to this field can be made by the Performance Measure Agency Entry user. Agencies should use this section to provide additional detail about program operations that are not included in the purpose. This should help answer any questions about what the program does. In addition, the description should include significant data disclosures. Data disclosures include the time period covered by the data, key data definitions, data collection methodology, data limitations, data corrections, and the person responsible for reporting and explaining the data including e-mail address. The maximum character length is 4000.
- h) Click the **Close** button to exit the screen or Click **Update Measures** to update performance measure information.

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The screenshot shows the 'Program Performance Measures' window. Callout 'd.' points to the 'Select Agency Program' section on the left, which includes a 'Budget Year' dropdown set to 'FY2015' and an 'Agency' dropdown set to 'Department of Agriculture [402]'. Callout 'f.' points to a table of programs with columns 'Code' and 'Name'. The table lists several programs, including 'Adams and Tilton Veterinary Laboratories' (0740001), 'Consumer Protection' (0740300), 'Departmental Administration' (0740101), 'Marketing and Promotion' (0740400), 'Payments to Georgia Agricultural Exposition Authority' (0740601), and 'Poultry Veterinary Diagnostic Labs' (0740501). Callout 'e.' points to the 'Program Rank' dropdown, which is set to 'Q'. Callout 'g.' points to the 'Program Purpose' and 'Program Description / Data Disclosure' text areas on the right. Callout 'h.' points to the 'Update Measures' button at the bottom right of the window.

IMPORTANT NOTICE

BudgetTool pre-fills the measures based on what the agency submitted during the previous year's budget development process. Users can access the measures submitted for the Governor's Budget Report from OPB's website at <http://opb.georgia.gov/governors-budget-reports> or by going to "Planning and Evaluation" link on OPB's website and then clicking on the Agency Performance Measures link.

The measures and data in this system will appear in the Governor's Budget Report exactly as they appear in BudgetTool. Therefore, **agencies are responsible for ensuring that measures are entered correctly, the data are accurate and that each measure has been validated in the Budget Tool system.**

B. Updating Measures

The agency is responsible for updating the performance measures and the related performance data. The steps to the process include:

- Reviewing the measure list and determining whether any measures need to be added changed, or deleted.
- Entering the most recent year's performance data, ensuring accuracy of prior years' data, and updating information as needed.
- Clicking validate to attest to the accuracy of the data submitted for each measure.

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Detailed descriptions for adding, changing and deleting measures follow.

1. No Changes to Measure List

a) If there are no changes to the list of measures, then for each measure:

1. Confirm or update the Measure Type
2. Confirm or update the Measure Category
3. Confirm or update Measure Sequence
4. Enter most recent year's performance data
5. Review the prior years' data and related performance information, and
6. Click Validate. This indicates to OPB that the agency attests to the accuracy of the data submitted.
7. Click the **Save** button.

2. Adding New Measures

a) Click the **Update Measures** button to access the Measures screen

a.

Code	Name
0740201	Athens and Tifton Veterinary Laboratories
0740300	Consumer Protection
0740101	Departmental Administration
0740400	Marketing and Promotion
0740601	Payments to Georgia Agricultural Exposition Authority
0740501	Poultry Veterinary Diagnostic Labs

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b) Click the **Add** button to create a new Measure

b.

Measure List

Agency : Department of Agriculture [402]

Program : Departmental Administration [0740101]

Measure List (Performance and Result)

Delete	Measure Category	Measure Type	Description	Seq #	Validate	ZBB Measure	Show In Book
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Add

Measures

c) Sequence Number: The sequence number will increment each time a new measure is added. This sequence is how the agency's measures will appear in the Governor's Budget Report. The user may change the sequence numbers if needed.

d) Measure Type: Choose the Measure Type from the menu list.

1. Cost per Unit
2. Dollars
3. Number
4. Percentage

e) Measure Category: Choose the category from the menu list.

1. Performance
2. Result

Performance measures may include unit cost, program completion rates, workload ratios, customer satisfaction indices and activity counts. Typically, performance measures are output or efficiency measures that answer the questions:

- How much did we do?
- How well did we do it?

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Result measures show whether program **outcomes** for clients are improving, declining, or stabilizing. Such measures may also compare program client outcomes to a national benchmark or to other clients who do not receive program services. Results measures should answer the question:

- **Is anyone better off?**

- f) Measure Description: Enter the Measure Description as you would like it to appear in the Governor's Budget Report/OPB website.
- g) Fiscal Year: Enter actual performance amounts or percentages for each fiscal year. Tab through to each entry box or click in the field.
- h) Validate: Once data for measure has been entered, check the description, fiscal year data and related performance measure information for accuracy and completeness, and then click Validate. This indicates to OPB that the agency attests to the accuracy of the data submitted.
- i) Click the **Save** button.

The screenshot shows the 'Measure List' application window. At the top, it displays 'Agency : Department of Agriculture [402]' and 'Program : Departmental Administration [0740101]'. Below this is a table titled 'Measure List (Performance and Result)' with columns: Delete, Measure Category, Measure Type, Description, Seq #, Validate, ZBB Measure, and Show In Book. A single measure is listed with Seq # 1. To the right of the table is an 'Add' button. Below the table is a section titled 'Measures [Can Edit]' containing a 'Sequence Nbr' field with the value 1, a 'Type' dropdown set to 'Dollars', and a 'Category' dropdown set to 'Performance'. Below these is a large text area for 'Measure Description'. To the right of the description is a table for 'Fiscal Year' with columns 'Fiscal Year' and 'Actual \$'. The fiscal year table lists FY 2010, FY 2011, FY 2012, and FY 2013. At the bottom right are 'Save' and 'Close' buttons. Annotations a-f point to the 'Measure Description' field, and g-i point to the 'Fiscal Year' table and the 'Save' button.

3. Changing or Editing Measures

- a) Highlight the measure to be updated in the Measure List. You may not change measures flagged as ZBB measures without approval from OPB.
- b) Edit the measure Type, Category or Description as needed.

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- c) Fiscal Year: Enter actual performance amounts or percentages for each fiscal year. Tab through to each entry box or click in the field.
- d) Validate: Check the description, fiscal year data and related performance measure information for accuracy and completeness, and then click Validate. This indicates to OPB that the agency attests to the accuracy of the data submitted.
- e) Click the **Save** button.

The screenshot shows the 'Measure List' window for the Department of Agriculture. It contains a table of measures and a detailed view of a selected measure.

Measure List (Performance and Result)

Delete	Measure Category	Measure Type	Description	Seq #	Validate	ZBB Measure	Show In Book
<input type="checkbox"/>	Performance	Number	Total number of Georgia Grown participants	1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance	Percentage	Percentage of total Farmers Market space leased to vendors	2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance	Number	Number of farmers, retailers and wholesalers utilizing the Atlanta Farmers Market	3	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Result	Percentage	Percentage increase in total sales at the Atlanta Farmers' Market	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Result	Percentage	Percentage increase in total users of the Atlanta Farmers' Market	5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Measures [Can Edit]

Sequence Nbr: 4

Type: Percentage Category: Result

Measure Description: Percentage increase in total sales at the Atlanta Farmers' Market

Fiscal Year

Fiscal Year	Actual %
FY 2010	N/A
FY 2011	3.00
FY 2012	-1.00
FY 2013	

Buttons: Add, Save, Close

Annotations: a. points to the Measure List table; b. points to the Measures [Can Edit] section; c. points to the Fiscal Year table; d. points to the Validate column in the Measure List table; e. points to the Save button.

4. Deleting a Measure

- a) Highlight measure to be deleted in the Measure List.
- b) Check the **Delete** box to delete the Measure. (If the box is shaded out then you cannot delete this measure without contacting OPB.)
- c) Click the **Save** button.

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a., b.

Delete	Measure Category	Measure Type	Description	Seq #	Validate	ZBB Measure	Show In Book
<input type="checkbox"/>	Performance	Number	Total number of Georgia Grown participants	1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance	Percentage	Percentage of total Farmers Market space leased to vendors	2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Performance	Number	Number of farmers, retailers and wholesalers utilizing the Atlanta Farmers Market	3	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Result	Percentage	Percentage increase in total sales at the Atlanta Farmers' Market	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Result	Percentage	Percentage increase in total users of the Atlanta Farmers' Market	5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Measures [Can Edit]

Sequence Nbr:

Type: Category:

Measure Description:

Fiscal Year	Actual %
FY 2010	N/A
FY 2011	3.00
FY 2012	-1.00
FY 2013	

C.

Deleting a Measure

NOTE: You cannot delete a measure that has been marked as ZBB or Show in Book. You may contact your OPB budget analyst to discuss your reasoning for deleting one of these measures.

Deleting a measure will remove the measure from the measure list. The sequence number for remaining measures will not automatically update following deletion. You may update the sequence number manually to establish consecutive numbering.

C. Management Review

Once you have updated your measures, you may generate a performance measure report for management review and approval. (Refer to the Reports section of the BudgetTool User Manual Section II.A – Agency User Guide for detailed instructions.). If the management review results in changes to the performance information, return to the performance measure data entry screen and make edits as appropriate. Please note that any changes to the performance information will require the user to re-validate the data in the system.

D. Submission Date

Final performance measure information is due in BudgetTool along with the agency budget requests. Please ensure that all measures are “Validated” in the system before this date.

E. OPB Review

OPB staff will review the performance measures and data submitted in BudgetTool and may contact agency performance measure liaisons with questions about the measures. Once the agency and OPB are satisfied with the content and all measures have been validated, OPB will make the final determination about which measures to include in the Governor's Budget Report. All final measures will be posted to OPB's website in a separate agency performance measure report.